

# Contents

*Preface* xv

## **Part 1 Basics 2**

### **1 Introduction to Mechanical Engineering Design 3**

- 1-1** Design 4
- 1-2** Mechanical Engineering Design 5
- 1-3** Phases and Interactions of the Design Process 5
- 1-4** Design Tools and Resources 8
- 1-5** The Design Engineer's Professional Responsibilities 10
- 1-6** Standards and Codes 12
- 1-7** Economics 13
- 1-8** Safety and Product Liability 15
- 1-9** Stress and Strength 16
- 1-10** Uncertainty 16
- 1-11** Design Factor and Factor of Safety 18
- 1-12** Reliability and Probability of Failure 20
- 1-13** Relating the Design Factor to Reliability 24
- 1-14** Dimensions and Tolerances 27
- 1-15** Units 31
- 1-16** Calculations and Significant Figures 32
- 1-17** Design Topic Interdependencies 33
- 1-18** Power Transmission Case Study Specifications 34
- Problems** 36

### **2 Materials 41**

- 2-1** Material Strength and Stiffness 42
- 2-2** The Statistical Significance of Material Properties 46
- 2-3** Strength and Cold Work 49
- 2-4** Hardness 52

- 2-5** Impact Properties 53
- 2-6** Temperature Effects 54
- 2-7** Numbering Systems 56
- 2-8** Sand Casting 57
- 2-9** Shell Molding 57
- 2-10** Investment Casting 58
- 2-11** Powder-Metallurgy Process 58
- 2-12** Hot-Working Processes 58
- 2-13** Cold-Working Processes 59
- 2-14** The Heat Treatment of Steel 60
- 2-15** Alloy Steels 63
- 2-16** Corrosion-Resistant Steels 64
- 2-17** Casting Materials 65
- 2-18** Nonferrous Metals 67
- 2-19** Plastics 70
- 2-20** Composite Materials 71
- 2-21** Materials Selection 72
- Problems** 79

### **3 Load and Stress Analysis 85**

- 3-1** Equilibrium and Free-Body Diagrams 86
- 3-2** Shear Force and Bending Moments in Beams 89
- 3-3** Singularity Functions 91
- 3-4** Stress 93
- 3-5** Cartesian Stress Components 93
- 3-6** Mohr's Circle for Plane Stress 94
- 3-7** General Three-Dimensional Stress 100
- 3-8** Elastic Strain 101
- 3-9** Uniformly Distributed Stresses 102
- 3-10** Normal Stresses for Beams in Bending 103
- 3-11** Shear Stresses for Beams in Bending 108
- 3-12** Torsion 115
- 3-13** Stress Concentration 124

- 3-14** Stresses in Pressurized Cylinders 127
- 3-15** Stresses in Rotating Rings 129
- 3-16** Press and Shrink Fits 130
- 3-17** Temperature Effects 131
- 3-18** Curved Beams in Bending 132
- 3-19** Contact Stresses 136
- 3-20** Summary 140
- Problems** 141

## **4 Deflection and Stiffness** 161

- 4-1** Spring Rates 162
- 4-2** Tension, Compression, and Torsion 163
- 4-3** Deflection Due to Bending 164
- 4-4** Beam Deflection Methods 166
- 4-5** Beam Deflections by Superposition 167
- 4-6** Beam Deflections by Singularity Functions 170
- 4-7** Strain Energy 176
- 4-8** Castigliano's Theorem 178
- 4-9** Deflection of Curved Members 183
- 4-10** Statically Indeterminate Problems 189
- 4-11** Compression Members—General 195
- 4-12** Long Columns with Central Loading 195
- 4-13** Intermediate-Length Columns with Central Loading 198
- 4-14** Columns with Eccentric Loading 198
- 4-15** Struts or Short Compression Members 200
- 4-16** Elastic Stability 204
- 4-17** Shock and Impact 205
- Problems** 206

## **Part 2 Failure Prevention** 226

### **5 Failures Resulting from Static Loading** 227

- 5-1** Static Strength 230
- 5-2** Stress Concentration 231
- 5-3** Failure Theories 233
- 5-4** Maximum-Shear-Stress Theory for Ductile Materials 233

- 5-5** Distortion-Energy Theory for Ductile Materials 235
- 5-6** Coulomb-Mohr Theory for Ductile Materials 242
- 5-7** Failure of Ductile Materials Summary 245
- 5-8** Maximum-Normal-Stress Theory for Brittle Materials 249
- 5-9** Modifications of the Mohr Theory for Brittle Materials 249
- 5-10** Failure of Brittle Materials Summary 252
- 5-11** Selection of Failure Criteria 252
- 5-12** Introduction to Fracture Mechanics 253
- 5-13** Important Design Equations 262
- Problems** 264

### **6 Fatigue Failure Resulting from Variable Loading** 273

- 6-1** Introduction to Fatigue in Metals 274
- 6-2** Approach to Fatigue Failure in Analysis and Design 280
- 6-3** Fatigue-Life Methods 281
- 6-4** The Stress-Life Method 281
- 6-5** The Strain-Life Method 284
- 6-6** The Linear-Elastic Fracture Mechanics Method 286
- 6-7** The Endurance Limit 290
- 6-8** Fatigue Strength 291
- 6-9** Endurance Limit Modifying Factors 294
- 6-10** Stress Concentration and Notch Sensitivity 303
- 6-11** Characterizing Fluctuating Stresses 308
- 6-12** Fatigue Failure Criteria for Fluctuating Stress 311
- 6-13** Torsional Fatigue Strength under Fluctuating Stresses 325
- 6-14** Combinations of Loading Modes 325
- 6-15** Varying, Fluctuating Stresses; Cumulative Fatigue Damage 329
- 6-16** Surface Fatigue Strength 335
- 6-17** Road Maps and Important Design Equations for the Stress-Life Method 338
- Problems** 341

## **Part 3 Design of Mechanical Elements 350**

### **7 Shafts and Shaft Components 351**

- 7-1** Introduction 352
- 7-2** Shaft Materials 352
- 7-3** Shaft Layout 353
- 7-4** Shaft Design for Stress 358
- 7-5** Deflection Considerations 371
- 7-6** Critical Speeds for Shafts 375
- 7-7** Miscellaneous Shaft Components 380
- 7-8** Limits and Fits 387
- Problems** 392

### **8 Screws, Fasteners, and the Design of Nonpermanent Joints 401**

- 8-1** Thread Standards and Definitions 402
- 8-2** The Mechanics of Power Screws 406
- 8-3** Threaded Fasteners 414
- 8-4** Joints—Fastener Stiffness 416
- 8-5** Joints—Member Stiffness 419
- 8-6** Bolt Strength 424
- 8-7** Tension Joints—The External Load 427
- 8-8** Relating Bolt Torque to Bolt Tension 429
- 8-9** Statically Loaded Tension Joint with Preload 432
- 8-10** Gasketed Joints 436
- 8-11** Fatigue Loading of Tension Joints 436
- 8-12** Bolted and Riveted Joints Loaded in Shear 443
- Problems** 451

### **9 Welding, Bonding, and the Design of Permanent Joints 467**

- 9-1** Welding Symbols 468
- 9-2** Butt and Fillet Welds 470
- 9-3** Stresses in Welded Joints in Torsion 474
- 9-4** Stresses in Welded Joints in Bending 479

- 9-5** The Strength of Welded Joints 481
- 9-6** Static Loading 484
- 9-7** Fatigue Loading 488
- 9-8** Resistance Welding 490
- 9-9** Adhesive Bonding 490
- Problems** 499

### **10 Mechanical Springs 509**

- 10-1** Stresses in Helical Springs 510
- 10-2** The Curvature Effect 511
- 10-3** Deflection of Helical Springs 512
- 10-4** Compression Springs 512
- 10-5** Stability 514
- 10-6** Spring Materials 515
- 10-7** Helical Compression Spring Design for Static Service 520
- 10-8** Critical Frequency of Helical Springs 526
- 10-9** Fatigue Loading of Helical Compression Springs 528
- 10-10** Helical Compression Spring Design for Fatigue Loading 531
- 10-11** Extension Springs 534
- 10-12** Helical Coil Torsion Springs 542
- 10-13** Belleville Springs 549
- 10-14** Miscellaneous Springs 550
- 10-15** Summary 552
- Problems** 552

### **11 Rolling-Contact Bearings 561**

- 11-1** Bearing Types 562
- 11-2** Bearing Life 565
- 11-3** Bearing Load Life at Rated Reliability 566
- 11-4** Reliability versus Life—The Weibull Distribution 568
- 11-5** Relating Load, Life, and Reliability 569
- 11-6** Combined Radial and Thrust Loading 571
- 11-7** Variable Loading 577
- 11-8** Selection of Ball and Cylindrical Roller Bearings 580
- 11-9** Selection of Tapered Roller Bearings 583
- 11-10** Design Assessment for Selected Rolling-Contact Bearings 592



<b>11-11</b>	Lubrication	596	<b>13-17</b>	Force Analysis—Worm Gearing	706
<b>11-12</b>	Mounting and Enclosure	597		<b>Problems</b>	712
	<b>Problems</b>	601			
<b>12</b>	<b>Lubrication and Journal Bearings</b>	609	<b>14</b>	<b>Spur and Helical Gears</b>	725
<b>12-1</b>	Types of Lubrication	610	<b>14-1</b>	The Lewis Bending Equation	726
<b>12-2</b>	Viscosity	611	<b>14-2</b>	Surface Durability	735
<b>12-3</b>	Petroff's Equation	613	<b>14-3</b>	AGMA Stress Equations	737
<b>12-4</b>	Stable Lubrication	615	<b>14-4</b>	AGMA Strength Equations	739
<b>12-5</b>	Thick-Film Lubrication	616	<b>14-5</b>	Geometry Factors $I$ and $J$ ( $Z_I$ and $Y_J$ )	743
<b>12-6</b>	Hydrodynamic Theory	617	<b>14-6</b>	The Elastic Coefficient $C_p$ ( $Z_E$ )	748
<b>12-7</b>	Design Considerations	621	<b>14-7</b>	Dynamic Factor $K_v$	748
<b>12-8</b>	The Relations of the Variables	623	<b>14-8</b>	Overload Factor $K_o$	750
<b>12-9</b>	Steady-State Conditions in Self-Contained Bearings	637	<b>14-9</b>	Surface Condition Factor $C_f$ ( $Z_R$ )	750
<b>12-10</b>	Clearance	640	<b>14-10</b>	Size Factor $K_s$	751
<b>12-11</b>	Pressure-Fed Bearings	642	<b>14-11</b>	Load-Distribution Factor $K_m$ ( $K_H$ )	751
<b>12-12</b>	Loads and Materials	648	<b>14-12</b>	Hardness-Ratio Factor $C_H$ ( $Z_W$ )	753
<b>12-13</b>	Bearing Types	650	<b>14-13</b>	Stress-Cycle Factors $Y_N$ and $Z_N$	754
<b>12-14</b>	Thrust Bearings	651	<b>14-14</b>	Reliability Factor $K_R$ ( $Y_Z$ )	755
<b>12-15</b>	Boundary-Lubricated Bearings	652	<b>14-15</b>	Temperature Factor $K_T$ ( $Y_\theta$ )	756
	<b>Problems</b>	660	<b>14-16</b>	Rim-Thickness Factor $K_B$	756
			<b>14-17</b>	Safety Factors $S_F$ and $S_H$	757
			<b>14-18</b>	Analysis	757
			<b>14-19</b>	Design of a Gear Mesh	767
				<b>Problems</b>	772
<b>13</b>	<b>Gears—General</b>	665	<b>15</b>	<b>Bevel and Worm Gears</b>	777
<b>13-1</b>	Types of Gears	666	<b>15-1</b>	Bevel Gearing—General	778
<b>13-2</b>	Nomenclature	667	<b>15-2</b>	Bevel-Gear Stresses and Strengths	780
<b>13-3</b>	Conjugate Action	669	<b>15-3</b>	AGMA Equation Factors	783
<b>13-4</b>	Involute Properties	670	<b>15-4</b>	Straight-Bevel Gear Analysis	795
<b>13-5</b>	Fundamentals	670	<b>15-5</b>	Design of a Straight-Bevel Gear Mesh	798
<b>13-6</b>	Contact Ratio	676	<b>15-6</b>	Worm Gearing—AGMA Equation	801
<b>13-7</b>	Interference	677	<b>15-7</b>	Worm-Gear Analysis	805
<b>13-8</b>	The Forming of Gear Teeth	679	<b>15-8</b>	Designing a Worm-Gear Mesh	809
<b>13-9</b>	Straight Bevel Gears	682	<b>15-9</b>	Buckingham Wear Load	812
<b>13-10</b>	Parallel Helical Gears	683		<b>Problems</b>	813
<b>13-11</b>	Worm Gears	687			
<b>13-12</b>	Tooth Systems	688	<b>16</b>	<b>Clutches, Brakes, Couplings, and Flywheels</b>	817
<b>13-13</b>	Gear Trains	690	<b>16-1</b>	Static Analysis of Clutches and Brakes	819
<b>13-14</b>	Force Analysis—Spur Gearing	697	<b>16-2</b>	Internal Expanding Rim Clutches and Brakes	824
<b>13-15</b>	Force Analysis—Bevel Gearing	701			
<b>13-16</b>	Force Analysis—Helical Gearing	704			

- 16-3** External Contracting Rim Clutches and Brakes 832
- 16-4** Band-Type Clutches and Brakes 836
- 16-5** Frictional-Contact Axial Clutches 837
- 16-6** Disk Brakes 841
- 16-7** Cone Clutches and Brakes 845
- 16-8** Energy Considerations 848
- 16-9** Temperature Rise 849
- 16-10** Friction Materials 853
- 16-11** Miscellaneous Clutches and Couplings 856
- 16-12** Flywheels 858
- Problems** 863

## **17 Flexible Mechanical Elements 871**

- 17-1** Belts 872
- 17-2** Flat- and Round-Belt Drives 875
- 17-3** V Belts 890
- 17-4** Timing Belts 898
- 17-5** Roller Chain 899
- 17-6** Wire Rope 908
- 17-7** Flexible Shafts 916
- Problems** 917

## **18 Power Transmission Case Study 925**

- 18-1** Design Sequence for Power Transmission 927
- 18-2** Power and Torque Requirements 928
- 18-3** Gear Specification 928
- 18-4** Shaft Layout 935
- 18-5** Force Analysis 937
- 18-6** Shaft Material Selection 937
- 18-7** Shaft Design for Stress 938
- 18-8** Shaft Design for Deflection 938
- 18-9** Bearing Selection 939
- 18-10** Key and Retaining Ring Selection 940
- 18-11** Final Analysis 943
- Problems** 943

## **Part 4 Special Topics 944**

### **19 Finite-Element Analysis 945**

- 19-1** The Finite-Element Method 947
- 19-2** Element Geometries 949
- 19-3** The Finite-Element Solution Process 951
- 19-4** Mesh Generation 954
- 19-5** Load Application 956
- 19-6** Boundary Conditions 957
- 19-7** Modeling Techniques 958
- 19-8** Thermal Stresses 961
- 19-9** Critical Buckling Load 961
- 19-10** Vibration Analysis 963
- 19-11** Summary 964
- Problems** 966

### **20 Geometric Dimensioning and Tolerancing 969**

- 20-1** Dimensioning and Tolerancing Systems 970
- 20-2** Definition of Geometric Dimensioning and Tolerancing 971
- 20-3** Datums 976
- 20-4** Controlling Geometric Tolerances 981
- 20-5** Geometric Characteristic Definitions 985
- 20-6** Material Condition Modifiers 994
- 20-7** Practical Implementation 996
- 20-8** GD&T in CAD Models 1001
- 20-9** Glossary of GD&T Terms 1002
- Problems** 1005

## **Appendixes**

### **A Useful Tables 1011**

### **B Answers to Selected Problems 1067**

*Index* 1073